

# Financial Disclosure Report (FDR) Instructions

1. Go to <https://webapps.sanantonio.gov/fdr/>

OFFICE OF THE CITY CLERK  
**FINANCIAL DISCLOSURE REPORTING SYSTEM**

**FDR Options:**  
Logoff

The City of San Antonio's Financial Disclosure Reporting (FDR) web based application contains information required to be disclosed by the City's Ethics Code.

The following help options are available.

**Email**  
[ethics@sanantonio.gov](mailto:ethics@sanantonio.gov)

**Business Support - Office of the City Clerk**  
Monday thru Friday 7:45AM - 4:30PM  
(General office number) 210-207-7253  
Rosalinda Diaz 210-207-7021  
Carri Wiggins 210-207-3397

**LOGON USING:**

☐ COSA network logon credentials.  
☐ SAP employee number.  
☒ Assigned logon id. (non city employees)

Logon ID:  
888888

Password:  
pass1

Login

2. Board members must select "Assigned Logon ID" Option
3. Enter assigned logon in "Logon ID:"
4. Enter pass1 in "Password:"
5. Select **Login**
6. On the Change Password screen

**Change Password.**

Current Password: pass1  
(First time users: use password sent in email)

New Password: pass2

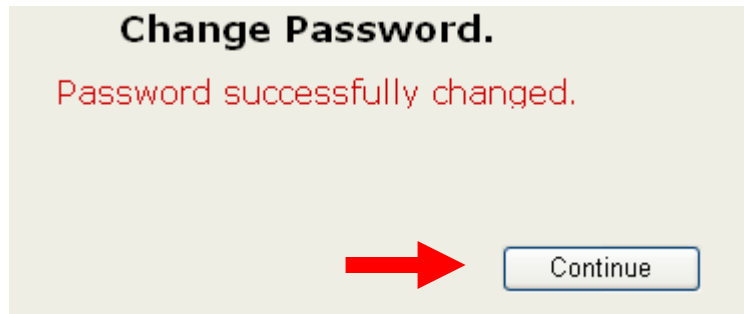
Retype New Password: pass2

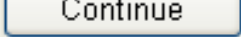
Change Password

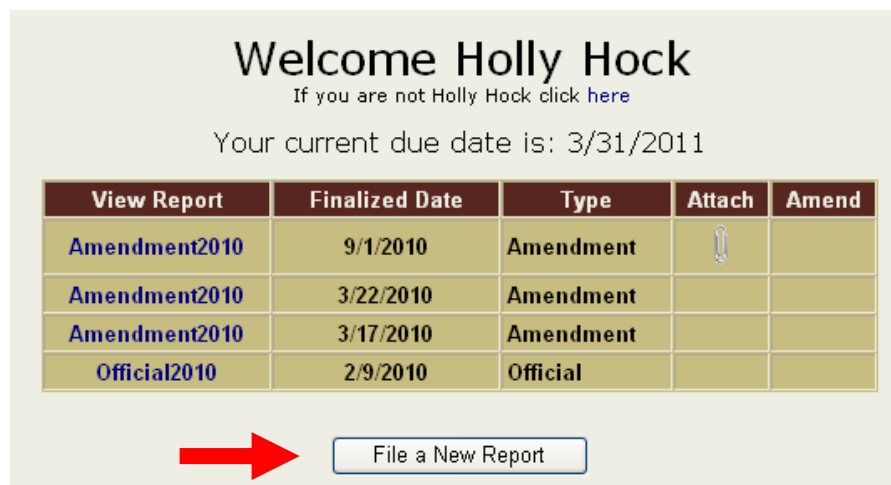
- a. Enter Current Password: pass1
- b. Enter a new password (enter a five characters or more)
- c. Retype the new password you have chosen
- d. Select **Change Password**

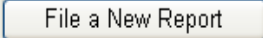
# Financial Disclosure Report (FDR) Instructions

7. You will see the following page if password was successfully changed



8. Press  to access your form



9. Click on  to access form

10. The following screen will appear:



Select Official 2011

# Financial Disclosure Report (FDR) Instructions

11. The Financial Disclosure Report form will appear:

The screenshot shows the top portion of the Financial Disclosure Report form for the City of San Antonio. It includes the city seal, the title "City of San Antonio Financial Disclosure Report", and instructions for use. Below the instructions is a section for "Type of Report" with radio buttons for "Initial" and "Annual" (selected). At the bottom, it shows the "Period of Report: From January 1, 2010 To December 31, 2010".

The reporting period should read: **From January 1, 2010 To December 31, 2010**

12. The name of the board / boards should auto-populate

This screenshot shows the "Status of Reporting Party" section. It has two rows. The first row has a checkbox for "City Official" and a label "Official Title:". The second row has a checked checkbox for "Board/Commission" and a label "Board/Commission Name: Ethics Review Board".

13. The board member name will auto-populate. If a spelling correction needs to be made, it can be done after the report is finalized with an amendment.

This screenshot shows section (A) "The reporting party's name:". It contains four input fields: "Last Name" (populated with "Hock"), "First Name" (populated with "Holly"), "Middle Name", and "Suffix".

14. Type in the answer, select the **ADD/SAVE** button. The answer moves below the window as shown below. Follow the same instructions for multiple entries.

This screenshot shows section (B) "Reporting party's employer(s):". It features a text input field for "\* Reporting party's employer" with a red arrow pointing to an "ADD/SAVE" button. Below this is a table with one entry: "Sea World". The table has columns for "\* Reporting party's employer(s)", "Edit", and "Delete". Red arrows point to the "Sea World" entry and the "EDIT" button. Below section (B) is section (C) "The name of any business entity\*", which includes input fields for "\* Name of Business Entity" and "\* Type of Economic Interest", along with an "ADD/SAVE" button. At the bottom, a "No Records Found" message is displayed, with a red arrow pointing to a "Next" link.

# Financial Disclosure Report (FDR) Instructions

15. At the bottom of each page select **Next** to go to the next page or click on the page number on the side menu.

**FDR Options:**

- ▷ Home
- ▷ Logoff
- ▷ Page 1
- ▷ Page 2
- ▷ **Page 3**
- ▷ Page 4
- ▷ Finalize
- ▷ Attachments

16. Fill out all fields. If you have nothing to disclose type "NA" in each field.

(D) The name of any business which the reporting party knows is a partner, or a parent or subsidiary business entity of a business owned by, operated by, or managed by the reporting party or his her spouse:

* Name of Business Entity	* Type of Economic Interest		
		ADD/SAVE	
* Name of Business Entity	* Type of Economic	Edit	Delete
NA	NA	EDIT	DELETE

(E) The name of any person or business entity from whom the reporting party or his or her spouse directly or indirectly:

(1) Has received and not rejected an unsolicited offer of subsequent employment, or  
(2) Has accepted an offer of subsequent employment which is binding or expected by the parties to be carried out:

* From whom offered	* By whom received	
NA	NA	ADD/SAVE

17. Your Legal Residence goes in (O):

(O) Legal Residence: By street address, or legal or lot-and-block description, of all real property\* used by reporting party as a legal residence located in the State of Texas in which the reporting party or his or her spouse has a leasehold interest, a contractual right to purchase, or an interest as: Fee Simple Owner; Beneficial Owner; Partnership Owner; Joint Owner with an individual or corporation; or owner of more than twenty-five (25) percent of a corporation that has title to real property.

\*There is no requirement to list any property:

(1) Used as a personal residence of a peace officer;  
(2) Over which the reporting party has no decision power concerning acquisition or sale;  
(3) Held through a real estate investment trust, mutual fund, or similar entity, unless the reporting party or his or her spouse participates in the management thereof;

* Identification by street address, or legal or lot-and-block description	* Type Interest/Right/Ownership	
		ADD/SAVE

18. On the last page is the message regarding Public Disclosure Information. You must make a selection for Consent for Release of Public Information (yes or no) for each of the following:

- Home Address
- Home Telephone Number
- Family Information
- Select the box indicating you have read the statement

# Financial Disclosure Report (FDR) Instructions

**FDR Options:**

- Home
- Logoff
- Page 1
- Page 2
- Page 3
- Page 4
- **Finalize**
- Attachments

### Public Disclosure of Information

The Texas Public Information Act provides that each government official may choose whether to allow the public access to the information in the custody of the City that contains your home address, home telephone number, or reveals whether you have family members. Please note that this does not apply to business addresses, which are subject of public disclosure. If an open records request is filed requesting to view or obtain records that contain your personal information, the City will take steps to protect your personal information as authorized by the Texas Public Information Act, but only if you have elected to protect personal information.

**I want** the public to have access to my: (Please Indicate)

Home Address	<input type="radio"/> Yes <input checked="" type="radio"/> No
Home Telephone Number	<input type="radio"/> Yes <input checked="" type="radio"/> No
Family Information	<input type="radio"/> Yes <input checked="" type="radio"/> No

**\* Consent for Release of Public Information**

☒ I understand that if any member of the public makes a request for information included in this Application for Appointment, most of the informatin must be disclosed under the Public Information Act. I understand that the City of San Antonio will attempt to maintain the confidentiality of highly private matters. In accordance with the information, and I hereby release the City of San Antonio, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act or any other law requiring its release.

## 19. Oath

- Select box indicating you have read the statement
- Type in your name
- The date auto-populates

**\* Oath**

☒ By clicking this box, I swear or affirm that the statements contained in this Financial Disclosure Report (including any accompanying supplements) to the best of my knowledge and belief are, true, correct, and complete.

1/28/2011

**Name** **Date**

20. You must click on **Finalize Report** for the report to be submitted.

21. If report was completed correctly, you will receive the following message:

### Report Submitted Successfully

OFFICE OF THE CITY CLERK  
**FINANCIAL DISCLOSURE REPORTING SYSTEM**

**FDR Options:**

- Home
- Logoff

**Report has been submitted Successfully.**

# Financial Disclosure Report (FDR) Instructions

22. If you need to add an attachment:
- Select attachment on the side menu

The screenshot shows the 'FDR Options' menu on the left with 'Attachments' selected, indicated by a red arrow. The main area is the 'Attach Supporting Materials' form. It has a text input for 'Select a data file to upload:' containing 'H:\forms\FDR logon instructions 2011.doc', a 'Browse...' button (indicated by a red arrow), and a 'File Description:' text area containing 'Property list'. Below these are 'Upload' and 'Exit' buttons. A red arrow points to the 'Upload' button.

- Browse...** to select your file, type a description and click **Upload**.
- You should get a message stating "Attachment Uploaded Successfully"

The screenshot shows the 'Attach Supporting Materials' form with a red message 'Attachment Uploaded Successfully' at the top, indicated by a red arrow. Below the form is a table titled 'Attached Files'.

	Description	Delete	Edit
10 Things to Remember.PDF	Property list	Delete	Edit

**Note: A file that is open cannot be uploaded.**

23. If you wish to make an amendment once the report has been finalized under FDR Options: select Home and then Amend next to the Official2011

The screenshot shows the user dashboard for 'Holly Hock'. It displays the 'FDR Options' menu with 'Home' selected. The main area shows a welcome message and the current due date '3/31/2011'. Below is a table of reports.

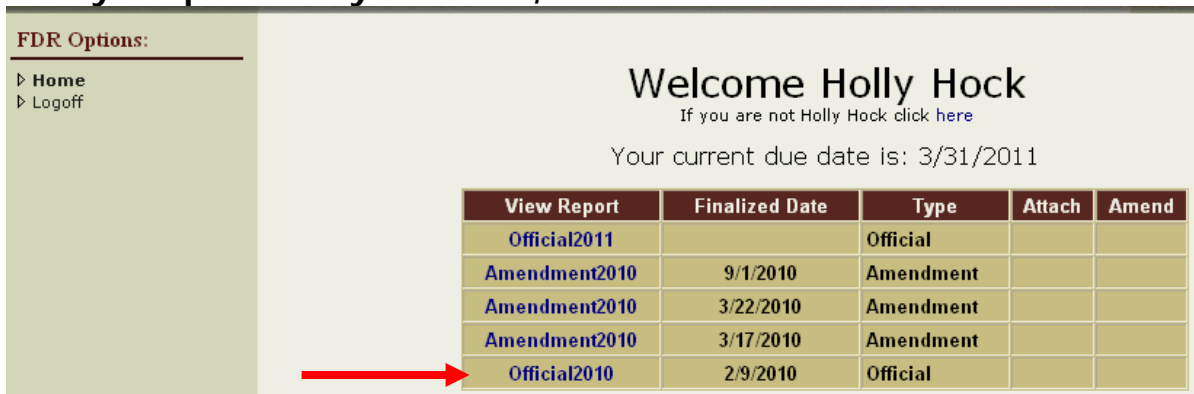
View Report	Finalized Date	Type	Attach	Amend
Official2011	2/2/2011	Official		Amend
Amendment2010	9/1/2010	Amendment		
Amendment2010	3/22/2010	Amendment		
Amendment2010	3/17/2010	Amendment		
Official2010	2/9/2010	Official		

A red arrow points to the 'Amend' button in the first row of the table.

**Note: Amendments are allowed up until the due date only.**

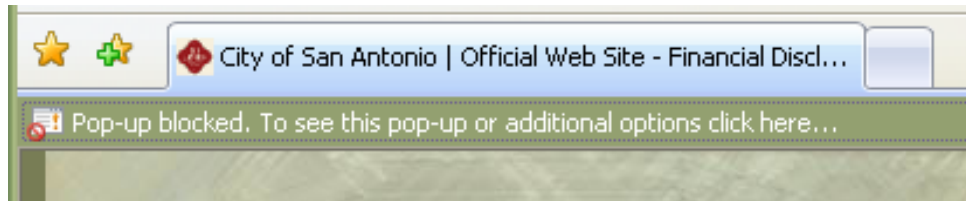
# Financial Disclosure Report (FDR) Instructions

24. To view your previous years FDR, on the Home screen click on Official2010

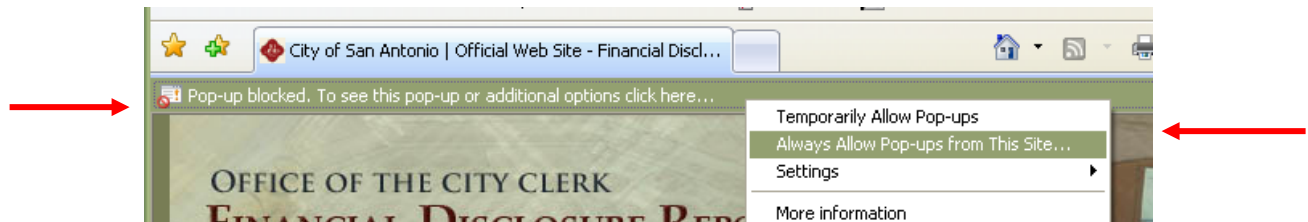


25. If you get an error message that reads:

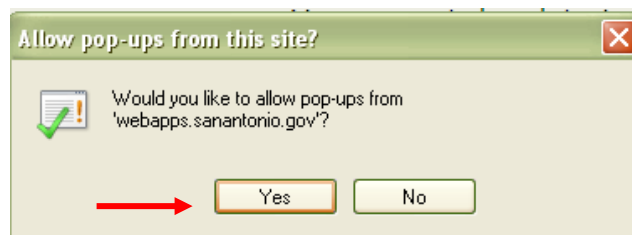
a. Pop-up blocked. To see this pop-up or ...



b. Click on the bar with the message, and then select "Always Allow Pop-ups" from the drop down menu.



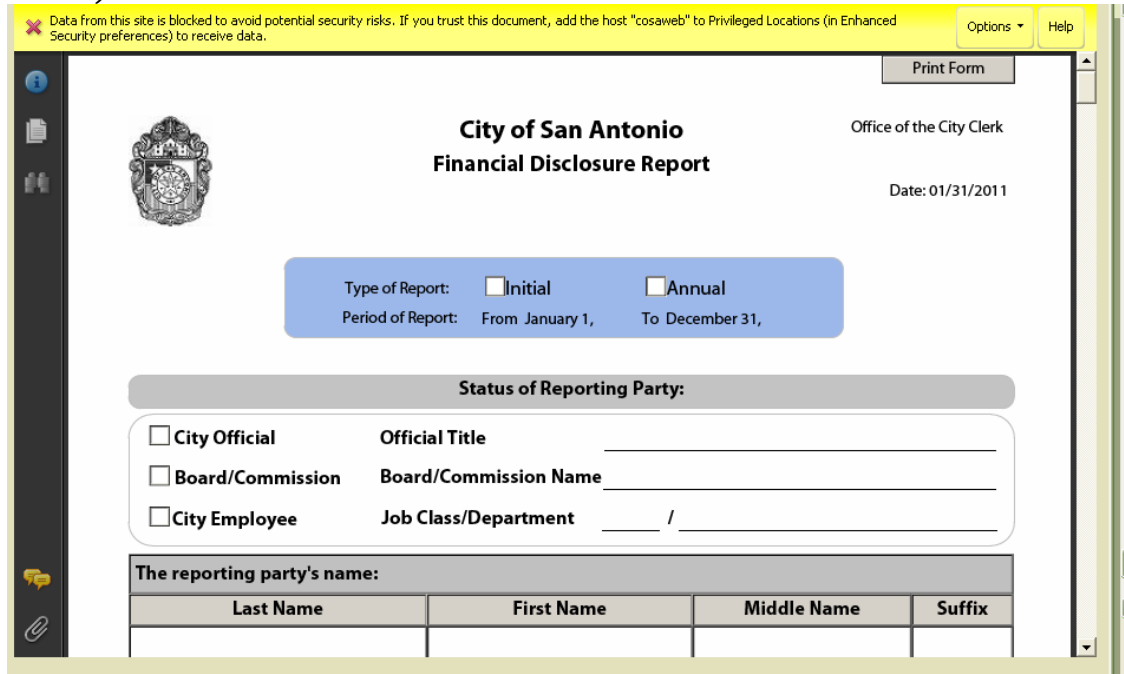
c. You will be asked to confirm that you want to allow pop-ups, select yes



# Financial Disclosure Report (FDR) Instructions

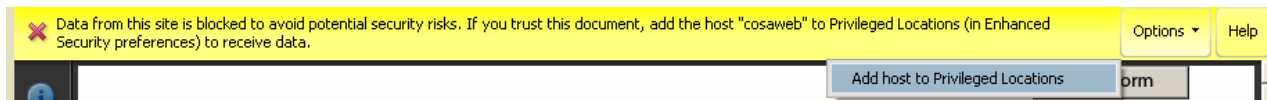
26. When the form opens, you may get this error message and a blank form:

*Data from this site is blocked to avoid potential security risks. If you trust this document, add the host "cosaweb" to Privileged Locations (in Enhanced Security preferences) to receive data.*



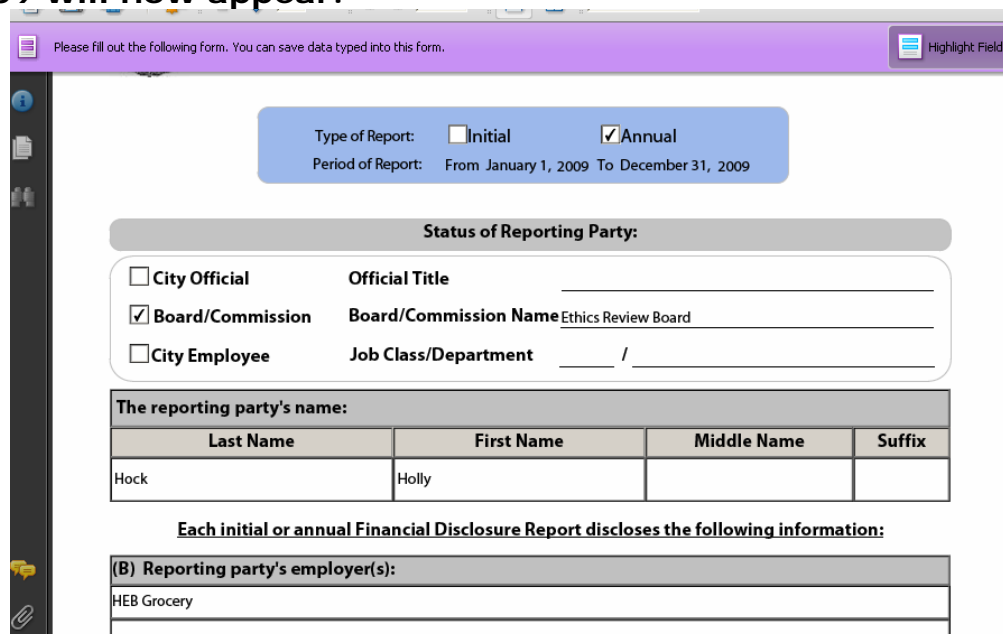
A screenshot of a web browser displaying a security warning at the top: "Data from this site is blocked to avoid potential security risks. If you trust this document, add the host 'cosaweb' to Privileged Locations (in Enhanced Security preferences) to receive data." Below the warning is the "City of San Antonio Financial Disclosure Report" form. The form header includes the City of San Antonio seal, the title "City of San Antonio Financial Disclosure Report", the role "Office of the City Clerk", and the date "Date: 01/31/2011". The form contains sections for "Type of Report" (Initial or Annual), "Period of Report" (From January 1, To December 31,), "Status of Reporting Party" (City Official, Board/Commission, or City Employee), and "The reporting party's name" (Last Name, First Name, Middle Name, Suffix).

a. Select *Options*, then *Add host to Privileged Locations*



A screenshot of a dialog box titled "Add host to Privileged Locations". It contains a text input field with "cosaweb" entered and a "Form" button. The background shows the same security warning as the previous screenshot.

b. The form with a reporting period of January 1, 2009 to December 31, 2009 will now appear.



A screenshot of the "City of San Antonio Financial Disclosure Report" form after the security warning has been resolved. The "Period of Report" is now set to "From January 1, 2009 To December 31, 2009". The "Status of Reporting Party" section shows "Board/Commission" selected with "Ethics Review Board" entered. The "The reporting party's name" section shows "Hock" for Last Name and "Holly" for First Name. Below this, a section titled "Each initial or annual Financial Disclosure Report discloses the following information:" contains a sub-section "(B) Reporting party's employer(s):" with "HEB Grocery" entered.



# Financial Disclosure Report (FDR) Instructions

27. If a board member has forgotten their password and puts in an invalid one this screen will appear:

OFFICE OF THE CITY CLERK  
**FINANCIAL DISCLOSURE REPORTING SYSTEM**

**FDR Options:**  
Logoff

The City of San Antonio's Financial Disclosure Reporting (FDR) web based application contains information required to be disclosed by the City's Ethics Code.

The following help options are available.

**Email**  
ethics@sanantonio.gov

**Business Support - Office of the City Clerk**  
Monday thru Friday 7:45AM - 4:30PM  
(General office number) 210-207-7253  
Rosalinda Diaz 210-207-7021  
Carri Wiggins 210-207-3397

**Invalid LogonId or Password.**

**LOGON USING:**

- ☐ COSA network logon credentials.
- ☐ SAP employee number.
- ☒ Assigned logon id. (non city employees)

Logon ID:

Password:

*Forgot Password*

- a. Select "Forgot Password" user is prompted for UserID:

OFFICE OF THE CITY CLERK  
**FINANCIAL DISCLOSURE REPORTING SYSTEM**

**FDR Options:**

Please enter your UserID and click "Submit".

☐ SAP ☒ System

UserID:

- b. An email will be sent to the email in the system with a new password.

28. Please note: There are known issues with Firefox. Please use Explorer or Safari to complete/view FDR reports."